



A SIMPLE CHECKLIST FOR SELECTING AN

# INNOVATION MANAGEMENT SOFTWARE VENDOR

WRITTEN BY

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## AN INNOVATION MANAGEMENT SOFTWARE VENDOR

We've compiled a simple checklist that can be used when choosing the right innovation management software vendor for your unique needs.

Use this 5-step checklist to kick off your innovation management software vendor selection process.

You can use this template as you like – sharing it with your colleagues is highly recommended!

To get even more out of this list, check out our tips and additional material linked to this list.

### 1. PLANNING

- Define your objectives and goals.
- Pick a suitable use case:
  - Innovation Management
  - Continuous Improvement
- Look for any technological requirements such as integrations.
  - Idea Challenge
  - Collaborative Strategy Process
  - Open Innovation
  - Other
- Educate yourself on different requirements regarding your use case



**Tip: Read our [Idea Management Software Buyer's Guide!](#)**



### 2. SOFTWARE REQUIREMENTS

- List some of the most important features and characteristics for the tool.
- Look for any technological requirements such as integrations.
- Define your budget.

### 3. VENDOR RESEARCH

- Educate yourself on different innovation management software vendors (use for example Capterra or GetApp).
- Search for vendors with positive customer reviews.
- Check their website and pay attention especially to:
  - Different features, integrations and appearance of the tool
  - Customer service/support
  - References and testimonials
  - Different pricing plans
  - The ease of getting started with the tool
  - Blog, user guides and other resources that support your innovation management process

- Shortlist the vendors that match your requirements. Pick 2-4 vendors to proceed with and pilot the software.

## 4. PILOT

- Choose a topic for your pilot.
- Sign up to the tool and go through the getting started guide/demo.
- Customize the tool according to your brand (logo, colors, etc.)
- Notify the participants in advance about the pilot (your goals, motivations, instructions, schedule).
- Invite the participants to use the tool and make sure everyone has a smooth start with it.
- Keep the conversation active throughout the pilot!
- Inform the participants about the progress of the pilot and reward active users.
- Remind the participants when the pilot has one week left. If there's a competition going on, remind them about that as well.
- Repeat the process with other potential vendors.



## 5. ANALYZE & COMPARE THE RESULTS



Download and use [The Vendor Scorecard Template](#) to compare different vendors!

- Assess the user experience and intuitivity of the tool. Ask participant feedback.
- Were the goals met? What were the pros and cons of the software?
- Pick the most suitable vendor for you and start planning for future ideation activities.

Once you've analyzed the pilot and identified things you can improve upon, you should come up with a plan on executing those changes so that you're ready for a larger roll out.

If some of the changes are related to the software itself, let the vendor know.

### Start in minutes

Validating ideas is easier with a dedicated tool for managing your entire ideation process.

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